



City of Lodi – Senior Fixed Income
Residential Certification Application

CITY OF LODI CUSTOMER INFORMATION

Please Type or Print

City of Lodi Customer of Record Account Number – (for example 12345)

Daytime Telephone Number- (Area Code first)

Name – As it appears on your City of Lodi Utility Bill

Date of Birth

Home Address – Do NOT Use a P.O. Box

Mailing Address – If different from above address

Senior Fixed Income Discount Guidelines:

Your household's gross income must not exceed \$45,000 annually AND you must be over 62 years of age. Fixed income must be the majority (at least 80%) of total income. The intent of this program is to give a discount to customers who primarily are on a fixed income and are senior citizens. Qualified applicants are not eligible for any other discount by the City of Lodi for their electric bill. To qualify the following checklist must be followed:

- ✓ Applicant must be the City of Lodi Customer of Record.
- ✓ Applicant may not be claimed as a dependent on another person's tax return.
- ✓ Applicant must attach to this application documentation showing that current income for all people living in the home does not exceed the income guideline limits. Application is considered incomplete without this documentation. (See back for examples of Proof of Income).
- ✓ Applicant must notify the City of Lodi Finance Department within 30 days of becoming ineligible for this discount.

HOUSEHOLD INCOME INFORMATION: (Proof of Income Must Be Included With Your Application)

"Fixed Income of Household" means all money and non-cash benefits, available for living expenses, from all fixed income, both taxable and non-taxable, before deductions for all people who live in my home. This is limited to: Child/Spousal support; Interest dividends or withdrawals from savings accounts, or retirement accounts such as IRA, pensions, retirement accounts and 401K accounts; Social Security; Veterans, disability or unemployment benefits and workers compensation; AFDC; SSI; SSP; Cash public assistance; Food Stamps and free housing or utilities; School grants, loans scholarships, or other aid.

Income considered not fixed includes but is not limited to the following: wage and salary income, commissions, business income, gains and income from stock; bonds, property and other assets, lottery and non retirement plan annuities.

The Fixed Income Worksheet on the reverse must be completed to prove income qualification.

DECLARATION (Please Read Carefully and Sign Below)

By signing below, I certify under penalty of perjury that the above provided information is true and correct under the laws of the State of California. I understand that the City of Lodi reserves the right to request verification of continued economic need at any time, and I will notify the City of Lodi Finance Department of any changes that affect my eligibility. I understand that the City of Lodi has the right to re-bill me at the applicable rate if appropriate.

X

City of Lodi Customer of Record Signature

? check if guardian or power of attorney

DATE

CITY OF LODI CUSTOMER SERVICES

209-333-6719



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CITY OF LODI Fixed Income Worksheet

Please Type or Print

HOUSEHOLD INCOME WORKSHEET: (Proof of Income Must Be Included With Your Application)

GROSS YEARLY FIXED INCOME OF HOUSEHOLD

+AFDC \$ _____
+Food Stamps \$ _____
+SSI / SSP \$ _____
+SSA \$ _____
+Pensions / Annuity/401k/IRA \$ _____
+Interest Income \$ _____
Total Fixed Income (sum of above) \$ _____ (A)

GROSS YEARLY NON-FIXED INCOME

+Wages/Commissions \$ _____
+Stock/Bond Income* \$ _____
+Business Income \$ _____
+All Other Income \$ _____
Total Non-Fixed Income (sum) \$ _____ (B)

Total Annual Income (add A & B) \$ _____ (Must be less than \$45,000 to qualify)

Line Above X 80% = \$ _____ (Line A must be greater than this line to qualify)

*Outside Retirement Plans such as 401k, Company sponsored plans

Instruction Sheet

This program provides for a monthly discount of 5% on your City of Lodi Electric Bill. The City of Lodi will use the completed application, along with income documentation you provide, to determine if your household meets the following fixed income guidelines. Should you qualify, your discount will appear as soon as practicable after the completed application has been received and verified. The City of Lodi will occasionally contact you to verify that your need for the program has not changed.

Proof of Income

The City of Lodi will use documentation you provide to determine whether your household qualifies under the income guidelines listed above. You must submit **CURRENT PROOF OF INCOME** for everyone receiving money in your household. Your application is considered incomplete without this documentation. The City of Lodi will contact you for updated income information if your documentation is incomplete or not current.

The following are examples of documentation you can submit as proof of your household income:

- **Agency Assistance:** Intake documentation from local agency showing household income and agency contact information.
- **Aid to Families with Dependent Children (AFDC):** Notice of Action; Computer printout; Benefit letter; Copy of check.
- **Child and/or Spousal Support:** Copy of check.
- **Disability Compensation:** Copy of current check; Printout from agency or insurance company verifying amount.
- **Federal Tax:** Form 1040 and accompanying worksheets (Schedule C, F, and Form 2555); Forms W-2 for all wage earners.
- **General Assistance:** Notice of Action from County Social Services; Copy of current check.
- **Interest Income:** Monthly or quarterly bank statement; Statement of interest income from bank or agency.
- **Pay Check Stubs:** Current stub(s) covering at least two months and showing gross income.
- **Pension and Annuities:** Copies of current check; Annual statement from pension plan.
- **Self-employed:** Federal Tax Forms 1040 and Schedule C; Two recent bank statements showing personal income.
- **Social Security:** Copy of current check(s); Notification from bank of direct deposit.
- **Supplemental Security Income (SSI):** Notice of Planned Action; Notification from bank of direct deposit.
- **Supplemental Security Payment (SSP):** Notice of Planned Action; Notification from bank of direct deposit.
- **Student Aid:** Financial Aid statement from College or University.
- **Support from an individual:** Copy of check and statement signed by person providing support.
- **Unemployment Benefits:** Copy of current check; Printout from Employment Development Department.
- **Veteran's Benefits:** A letter indicating receipt of Veteran's Pension; Copy of VA check.
- **Other Sources of Income:** Documentation of other money received by your household and used to pay your monthly bills.

PLEASE NOTE: Unaltered documents should be submitted. Originals will not be returned.